**THOMAS NGOLENI**

**Mobile: +254727925879 | Email: ngolenithomas@gmail.com | Nairobi, Kenya.**

**LinkedIn:** [**https://www.linkedin.com/in/thomas-ngoleni/**](https://www.linkedin.com/in/thomas-ngoleni/)

**PROFESSIONAL SUMMARY**

Results-oriented Data Analyst and Customer Experience Strategist with over 12 years of experience in the banking sector, currently serving as an Affluent and Wealth Portfolio Analyst at Standard Chartered Bank Kenya. Proven expertise in leveraging customer feedback, transactional data, and advanced analytics to drive strategic initiatives and enhance customer satisfaction. Demonstrated success in operational excellence and improving Net Promoter Scores (NPS) through data-driven insights and cross-functional collaboration.

**CORE COMPETENCIES**

* Customer Experience Analysis: Proficient in analyzing customer feedback, journey mapping, and identifying key drivers of satisfaction and loyalty.
* Data Analytics & Visualization: Advanced skills in Excel and Power BI for data analysis and reporting.
* Stakeholder Engagement: Effective communication with internal teams and external partners to implement customer-centric strategies.
* Project Management: Skilled in Agile methodologies and project delivery

**SELECTED ACHIEVEMENTS**

* Spearheaded the development of a comprehensive customer journey analytics framework, leading to a 20% improvement in customer satisfaction scores.
* Implemented a Voice of Customer (VoC) program that identified key drivers of dissatisfaction, resulting in targeted initiatives that improved NPS by 15%.
* Collaborated with marketing and product teams to design and execute A/B tests, optimizing customer engagement strategies and increasing conversion rates by 18%.

**WORK EXPERIENCE**

**Senior Affluent and Wealth Analyst- Standard Chartered Bank (April 2023 - To Date)**

*Commercial Responsibilities:*

* **Handle inbound calls from all Priority clients both New to Bank (NTB) and Existing to Bank (ETB)** regarding sales, service or transaction requests and fulfil clients’ needs within the same interaction as much as possible.
* **Acquisition of High-Net-worth Clients and servicing their complex needs** -Meeting my acquisition numbers month on month through conversion of Branch walk-in Priority Clients, ensuring that I handle all the requests end to end.
* **Administrative support to Priority Relationship Managers**: I support the frontline team in handling client service issues, onboarding of new clients/products, simple transactions e.g. Term Deposit renewals and ongoing monitoring processes.
* **Maximise Service-To-Sales opportunities**: I engage clients directly and offer solutions based on their wealth needs and the client’s risk profile.
* **I educate and steer clients for interactions with the bank** via online and machine channels to self- serve and resolve simple requests.
* **Support on customer instructions verification** in the system and process other client service requests through Customer Relationship Management tool as required.

***Other Responsibilities:***

* **Client Value Proposition analysis:** Client onboarding journey analysis, client behavior trends and sales analysis, relationship vintage and deciles to unearth critical insights to support business case developments.
* **Training of the Frontline staff on Client Value Proposition and sales Strategies:** Responsible for crafting the content pack on Client Value Proposition for Affluent and training the frontline team.
* **Conduct Comprehensive Portfolio Reviews**: Collaborate effectively with Portfolio Managers, Products team, Client Acquisition and Relationship teams to share growth opportunities unearthed through analysis, within the hub and individual portfolios.
* **Productivity Tracking:** Analysis on individual frontline productivity as well as product performance per segment: i.e. Priority-Premium segments and advise the product managers on key insights.
* **Business Key Performance Indicator (KPI) Reporting**: Create easily consumable, visualized reports on business performance and metrics for key stakeholders with actionable insight callouts that influence decision-making.
* **Develop Tailored Wealth Management Strategies**: Collaborate with relationship managers to create customized wealth management strategies that align with clients' financial objectives.
* **Evaluate Market Trends and Investment Opportunities**: Continuously monitor global economic trends and financial markets, analyzing data and news to identify emerging investment opportunities and potential risks for affluent clients' portfolios.
* **Nimble Learning:** Actively learning through experimentation when tackling new problems, both successes and failures as a learning factor

**Reconciliation and Analytics Manager- Standard Chartered Bank (March 2019 - March 2023)**

*Reconciliation Duties and responsibilities:*

* **Streamline Reconciliation Processes**: Led efforts to review and optimize reconciliation workflows, identifying opportunities to automate and reduce manual intervention, improving efficiency and accuracy.
* **Discrepancy Resolution**: Investigated and resolved reconciliation discrepancies by conducting root cause analyses, coordinating with relevant teams, and implementing corrective actions to minimize errors and operational risks.
* **Quality Assurance**: Developed and oversaw quality control measures, ensuring data accuracy and compliance with regulatory standards, conducting regular audits to maintain high-quality reconciliation practices.
* **Process Documentation**: Created and maintained comprehensive documentation of reconciliation procedures, ensuring adherence to internal and external compliance requirements.
* **Regulatory Compliance**: Equipped myself with knowledge on compliance standards related to reconciliation and implemented changes to ensure adherence to evolving requirements.

*Analytics Duties and responsibilities:*

* **Data Analysis and Insights**: Conducted in-depth data analysis to derive actionable insights from financial data, identifying trends, patterns, and areas for process enhancement.
* **Performance Dashboards**: Created intuitive and visually informative performance dashboards that provided real-time insights into reconciliation and analytics KPIs.
* **Automation Implementation**: Collaborated with technology teams to implement analytics tools and solutions, leveraging automation to enhance data reporting and streamline the analytics process.
* **Predictive Modelling**: Developed and maintained predictive models to forecast reconciliation needs, optimize resource allocation, and identify potential operational risks or opportunities.
* **Strategic Recommendations**: Provided data-driven recommendations which supported strategic decision-making, cost-saving initiatives, and process efficiencies, based on analytical insights and a strong understanding of the data landscape.

**Assistant Collections Manager — Standard Chartered Bank (April 2017 - March 2019)**

*Duties and Responsibilities:*

* **Delinquent Account Resolution**: Developed and implemented strategies to efficiently manage and resolve delinquent accounts, utilizing negotiation, repayment plans, and legal actions where necessary to recover outstanding balances and reduce credit risk.
* **Team Leadership and Training**: Provided guidance and mentorship to collections teams, ensuring they adhered to bank policies, compliance requirements, and best practices, while also organizing regular training sessions to enhance their skills and knowledge.
* **Portfolio Analysis and Strategy Development**: Analysed portfolio performance, segment accounts based on risk and recovery potential, and created tailor made collection strategies to maximize recovery while minimizing losses.
* **Regulatory Compliance**: Equipped myself with knowledge on industry regulations and ensured that the same knowledge was shared with collections team by incorporating the changes and updates into collection processes and strategies.
* **Performance Metrics and Reporting**: Established key performance indicators (KPIs) for the collections team, regularly monitoring and reporting on the performance against these metrics.

**Reconciliation officer — Standard Chartered Bank (November 2012 - March 2017)**

*Risk and Governance Duties:*

* **Risk Assessment:** Conducted regular risk assessments of reconciliation processes, identifying potential vulnerabilities, and developing risk mitigation strategies to ensure the integrity of financial data.
* **Compliance Oversight**: Monitored regulatory and internal compliance requirements related to reconciliation activities, implemented necessary changes, and ensured that the reconciliation team adhered to all relevant standards.
* **Audit Facilitation**: Collaborated with internal and external audit teams, providing necessary documentation and assistance to ensure the accurate and efficient completion of reconciliation audits and assessments.
* **Governance Reporting**: Prepared and presented governance reports to senior management, summarizing the status of risk and governance initiatives within the reconciliation function.

*Reconciliation Duties:*

* **Data Reconciliation**: Oversaw daily data reconciliation processes, ensuring the accurate matching of financial data, and proactively resolving discrepancies thus minimizing operational risks.
* **Exception Handling**: Implemented procedures to handle exceptions in the reconciliation process, working closely with relevant teams to address issues promptly and minimize disruptions to operations.
* **Process Automation**: Identified opportunities for automation in reconciliation workflows by collaborating with technology teams to implement enhancements that reduced manual efforts and increased efficiency.
* **Quality Assurance**: Established and maintained quality control measures to validate data accuracy, conducting regular audits and reviews to ensure data integrity and adherence to internal and regulatory standards.
* **Documentation and Training**: Developed and maintain comprehensive documentation of reconciliation processes and provided training to team members to ensure alignment with established procedures and standards.

**EDUCATION**

Bachelor of Arts -2nd Class Honors Upper Division (Mathematics and Sociology)

University of Nairobi - 2010

**CERTIFICATION**

International Association of Business Analytics Certification (Ongoing)

African Centre for Data Science and Analytics (March 2025-January 2026)

**REFEREES**

Available upon Request